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JULY 1991

5-DIGIT 20814
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BRENDAN MCNALLY
STATISTICAL REFERENCE IDX
CONGRESSIONAL INFO SER.
4520 E. WEST HIGHWAY
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TOP 100 RETAILERS & JOBBERS

HARD PARTS REPORT

PROGRAMMED DISTRIBUTION UPDATE

Chilton's
AUTOMOTIVE MARKETING

JULY ISSUE/VOLUME 20, NUMBER 7

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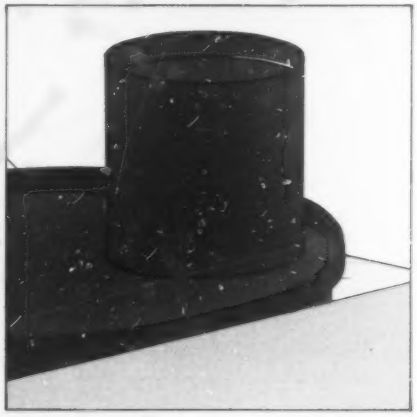

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EDITORIAL STAFF
FAX (215) 964-4981

Steve Davis, Editor (215) 964-4395
Phil Katcher, Business Editor
John Wirebach, Senior News & Feature Editor
Wendy Ampolsk, Contributing Editor
Edward L. Kaufman, Contributing Editor (201) 567-6158
Bonnie Lynne Shannon, Editorial Assistant
Jake J. Smith, Creative Director
Mike Trinsey, Art Director
Sarah Frankson, Group Publisher (215) 964-4390

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CHILTON OFFICERS
Gary R. Ingersoll; President
Donald W. Chestnut; Sr. V.P. Operations/Admin.
Christopher M. Savine; V.P., Finance, C.F.O.

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AUTOMOTIVE MARKETING-ISSN 0193-3264 Published monthly (12 times a year) by Chilton Company, Chilton Way, Radnor, PA 19089. Chilton Co. is a division of American Broadcasting Companies Inc., New York, NY. Subscription prices (payable in advance) in the United States and U.S. possessions $36.00 a year; Canada, $70.00 a year. Single copies $3.50 each when available. U.S. only. SECOND CLASS postage paid at Wayne, PA 19087 and additional mailing offices. Postmaster send form 3579 at AUTOMOTIVE MARKETING, PO Box 1446, Riverton, NJ 08077. Canadian GST Registration Number is R125906743.

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MARKET LINE

A Primer On Programmed Distribution In The Nineties

Around 1985, a "Third Generation" of 8-10 programmed distribution groups blossomed with similar names like IWDI and IWDA, unique names like Trustar and Eagle Nation, or simple titles like Delta 3 or DWC, and so on. These groups stemmed from the success, or lack of success, of older programmed distributors. To consider this, we have to step back and examine the first and second generation programs.

The first generation, the grandfathers of programmed distribution, are NAPA (Atlanta), Big A (Houston) and Parts Plus (Memphis). The three all began before 1970 and are controlled by a single WD, although other WDs participate in the programs.

NAPA is by far the most successful with almost 7,000 jobbers and a consumer known NAPA brand. Other groups want to be like NAPA. Eight of our top 100 chains are NAPA jobbers including Genuine Parts, Atlanta, which owns more than 600 stores. NAPA is now signing installers under the NAPA Autocare flag to further lock in distribution.

Big A and Parts Plus have taken some lumps in recent years and have recovered as APS (which went through an LBO in 1988) revitalized its programs and Parts Inc., Memphis, slowed down a buying spree to consolidate a bit. APS serves about 1,600 jobbers and Parts Plus about 2,500.

All these groups offer full service program distribution with volume buying, private labels, heavy advertising and promotional programs, computerized ordering, business advice for the jobber and practically any service the central office can give. Most importantly, decisions are made in central offices and followed by members. These groups are very close to being national chains.

Second Generation

Two factors spurred a second generation of programs in the 1970s: First, the 1973 Arab Oil Embargo closed as many as 100,000 wholesale customers; and second, DIY sales rose at retail chain stores. Depending on who did the counting, some 15-20 groups started in the mid-1970s but many fell by the wayside.

Among the winners was Carquest, probably the most successful second generation group. Carquest suffered a bad patch of bankruptcies among its WDs a few years ago but it quickly filled the voids in distribution. Like NAPA, Big A, and Parts Plus, it has national programs, warranties, and installer programs. Carquest has 15 WDs and about 2,300 jobbers. Recently, co-founders Temple Sloan of General Parts, Raleigh and Joe Hughes of the Indiana Parts Warehouse, Indianapolis merged under the General Parts logo. General Parts now has branches in Indiana, Michigan, Minnesota, and Montana, as well as almost every Southeastern state.

Other successful second generation groups include:

- Autoshare, a regional program run by Alexander Seewald, Atlanta.
- Auto Pro, until recently owned by Taylor Parts, Andalusia, AL, but now shares are sold to member WDs.
- Bumper to Bumper suffered when Al Automotive went bankrupt but is now controlled by its member warehouses. "Now, we're a democracy, watch us go," said new director Lee Synott.

Unlike the first and second generation groups, the third generation groups offer little more than buying power. A very few, such as Federated, have private label programs. Some are beginning to offer some services. Most members are WDs

TOP 20 CHAINS IN NEW PROGRAM GROUPS

From our Top 100 list, here are the leading chains that belong to the third generation programmed distribution groups that were organized in the 1980s. For the top chains belonging to other programmed distributors, see our newest Top 100 list elsewhere in this issue.

Rank	Chain	Location	Program	# of Stores
1.	Fisher Auto Parts	Staunton, VA	Federated	181
2.	O'Reilly Automotive	Springfield, MO	Auto Value	115
3.	Advantage Auto	Rochester, NY	Auto Value	72
4.	Kentucky Motor Service	Covington, KY	Federated	50
5.	Big Wheel Auto/Rossi	Mendota Hts, MN	RPM	40
6.	Ace Auto Parts	Clearwater, FL	Auto Value	40
7.	Pettigrew-Smith/Dales	Houston, TX	IWDA	37
8.	Twin "B" Auto	VA Beach, VA	RPM	28
9.	Barnes Motor & Parts	Wilson, NC	APA Mgt	27
10.	Bennett Auto Supply	Oakland Park, FL	Auto Value	23
11.	Kirkham Auto Parts	Blackfoot, ID	Auto Value	23
12.	Acme Auto Supply	W. Hartford, CT	Auto Value	21
13.	VIP Discount Auto	Lewiston, ME	RPM	20
14.	Gatling's Auto Stores	Connellsville, PA	Eagle Nation	20
15.	All State 1	Metairie, LA	IWDI	20
16.	Arnold Motor Supply	Spencer, IA	Auto Value	19
17.	Interstate Auto	Elizabethtown, KY	Federated	19
18.	National Auto Supply	St Louis, MO	Federated	17
19.	OK Auto Supply	Ispheming, MI	APA Mgt	17
20.	Knecht's Discount	Springfield, OR	Eagle Nation	15

Source: *Automotive Marketing* Top 100, 1991

who passed up earlier opportunities to join programs or were simply passed by. A western WD who didn't want to join a program in the 1970s said, "I joined XXX just because the pressure was on from mass market guys taking retail business and two-steppers (WDs, suppliers) taking wholesale business and I went there to fight this. The only way is to get together and go to the manufacturer and pledge some volume and get some points off. Get some strength in numbers."

Counting Heads

Other WDs had the same idea. Getting firm counts on the number of jobbers in programs (or even the total number of jobbers) is about as hard as eating soup with a fork. But we'll try here.

NAPA, Big A, and Parts Plus have 10,500 jobbers, more or less. That's roughly 40% of all jobbers if you accept 26,000 as the number of total jobbers. The second generation groups we talked about above add about 4,500 more jobbers. So roughly 60% of all jobbers joined programs by the 1980s.

Early programmed distributors formed to beat back retailers and get jobbers their share of the DIY market. We've used this quote before, but no one has ever summed it up better than Bob McKenna, president of NAPA, "What

around with our heads in the sand and allowed retailers to have the retail market. It's just like the car companies were to blame for letting us have the repair market years ago. If we'd acted 10 years ago with the programs we have now in merchandising and advertising the retail chains would never have gotten a foot in the door. Now we have to go back and battle them for our share."

By and large the programs succeeded in making jobbers better retailers. However, they did not hurt retail chains as much as they hurt the independent jobber. Perhaps 10,000 jobbers were left out in the cold and more than 3,000 jobber stores closed in ten years. One could easily say that instead of fighting the chains, the programs simply displaced jobbers and WDs who did not join a program.

Our western WD avoided earlier groups because, he said, "They went to market doing everything for the jobber. They demanded and told him what to do. I didn't like that attitude. I don't own any stores, and I grew up on service to the jobber. I want to keep him independent." But, by the mid-1980s, he was in trouble. "I didn't control any distribution and that was the way our market was heading. Everybody was a two-stepper," he said.

In other words, everyone, at every level, was getting a better price. According to third generation program directors, the motivation to start the programs was simply price, price and price.

Gary Piper, who runs the IWDA (Independent Warehouse Distributors Association), Humble, TX, said, "I worked for a vendor and knew the extra things to be had, and I knew the customers weren't getting the deals." Piper said IWDA (Road Pro) now has 65 WDs, 1,300 jobbers who use IWDA as a "primary supplier," and $500 million in WD sales.

Bill Burns, president of IWDI (Auto Pride), New Haven, CT, said, "There was a caste system in place. One group of WDs had a better cost acquisition advantage. Some used it as an effective discount and some just passed it on the street. We formed initially as a buying group." IWDI has 120 WDs and 514 jobbers who have signed papers with IWDI.

At Federated, Staunton, VA, Rusty Bishop said there was kind of a race by WDs to get involved when Federated began in 1985 "Right about the time we got started, a few big manufacturers put together some attractive packages for groups. That encouraged people to join." Federated has 99 WDs and 2,368 jobbers in the program, Bishop said.

At Eagle Nation, Pearland, TX, Chuck Medlin, said, "Basically, other guys were getting better incentives and better pric-

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ing. Other WDs found out they could get it by doing a group. You want the extra 5%, you have to have a group. It's the same scenario as when the WD system started in the 1940s. The manufacturers made the rules." Medlin said Eagle Nation has 141 WDs and 2,400 jobbers.

Everybody Involved

The four groups above claim about 6,500 jobbers. There are another half a dozen groups out there that claim at least that many again, although we are suspicious of some counts. For example, one group claims 15,000 jobbers. Even leaving out counts like that, by referring to several guides to program groups in jobber trade magazines we came up with roughly 1,000 WDs and 25,000 jobbers claimed as members. So, it seems obvious that very few jobbers are not involved with some group in some fashion. And, if so, that would suggest that virtually every WD or jobber is getting, or should be getting, some kind of special deal. Now is a deal a deal when everyone gets it?

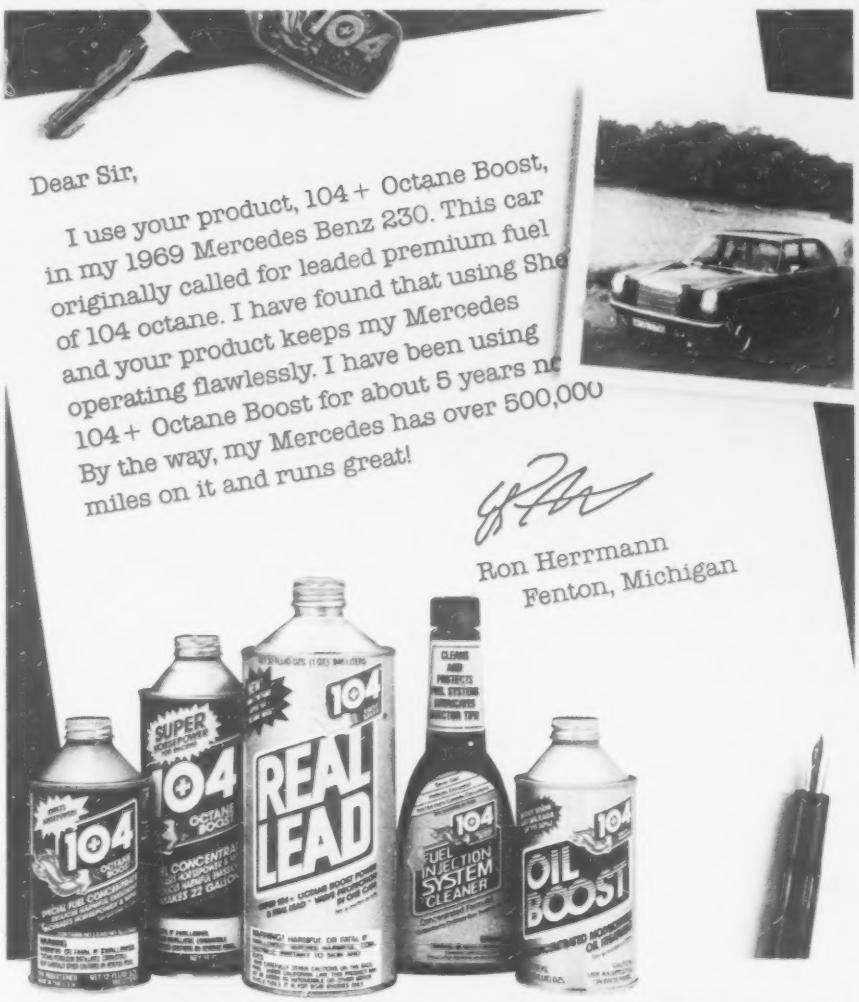
As the Western WD discovered, there are deals and there are deals. "We had 40-50 people in the group but a lot were little guys doing $2-3 million and because 40-50 people can never agree on one line we still didn't have enough volume to get the best discount. You split a line four ways and you don't have any volume."

Few third generation groups require members to have uniform lines. In most cases, the group office simply stamps a vendor as approved for the group and gives the vendor the right to sell to the group. "I tell our members," Medlin said at Eagle Nation, "use the group. Don't go off on your own. Ask if the line is an approved program. Basically, we try for two vendors in major lines. The manufacturer understands we can't sell 141 WDs. There are competitive territories. We approve the line and have the vendor sell it. Most of our members will not listen to non-approved vendors."

Most third generation programs simply supply approved vendors a list of WDs. IWDA's Piper laughed and agreed when we called it a hunting license. Vendors are expected to make concessions simply to get permission to sell a line. Down Mexico way it's called *mordida*.

While this is not a major problem, there are manufacturers starting to question what they are getting out of selling the groups. That has some serious implications for programs as Larry Anton, president of Larry Anton and Associates, Fort Worth, TX, who also manages the U.S. Performance program group in Fort Worth, pointed out: "Manufacturers were afraid not to play along with the groups for fear of losing business. So many began to offer longer deals and better terms in expectation of new business. But now manufacturers have given up points for no new business. Too many groups are only there for the best deal. Now manufacturers are going to demand performance in return for further concessions and a contractual agreement such as is customary in retail and mass markets. So it's the groups that can deliver on their promises and can demonstrate that they can do something for the manufacturer that will take distribution into the next phase."

Indeed, some WDs left new groups for older, established programs. The western WD said, "We felt the need for more of a total package. We were just selling price in the group. But we didn't have national advertising, Tech-Net, or a national warranty. Instead of selling price, I can sell jobbers a total package. You kind of feel like part of something. You kind of like to be looked at like a NAPA or Big A. That's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And a southern WD said, "Instead of a little three by five foot sign that says we belong, we get a total package so we can compete with Carquest and Parts Plus. It's hard to put into words what the national exposure is worth. You want to advertise and be noted. You can't do that in a buying group. In the (buying group) all they wanted was a program to tie the jobbers to the warehouse: they didn't care if it made the jobbers competitive or not. If they got more jobbers, they could get better terms."

Helping The Jobbers

There's evidence that at least some of the new groups are moving in this direction. IWDI's Burns said, "We advocate helping the jobber. The jobber is the one getting squeezed out of the marketplace. The bottom line is, though, he serves a unique function. The installer needs parts and WDs don't offer hot shot delivery. That's what the jobber does. But that's often not where the discounts and extra funds are dedicated. Too often the funds just provide an opportunity for the WD to firm up some aspect of his business. Groups have to look at the short and long term. For the short term a buying group is fine, but long term you have to become a marketing group. You have to offer programs to the downstream customers. You have to give the jobber the opportunity to be a unique supplier with the best combination of parts and service. That's another tool to sell. It's not just price."

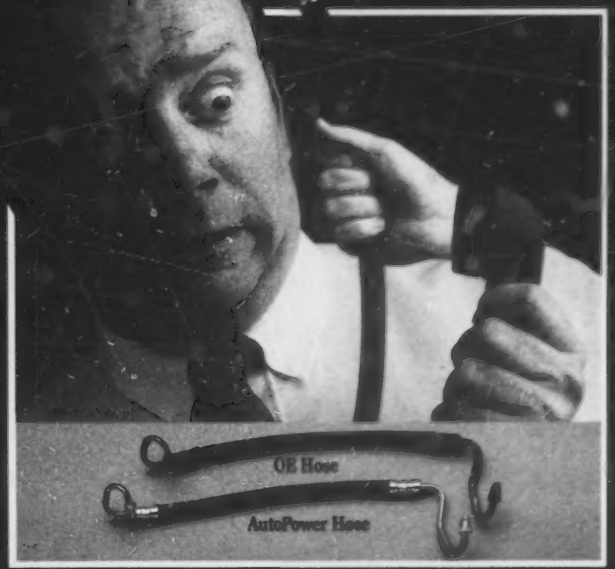
And Floyd Percy, who runs RPM, Roanoke, VA, with 16 members owning 238 stores, said his members originally formed for better buying. "But we've already moved on with excellent meetings. We've added a day to our meetings where we can talk about members' problems like employee spiffs, leases, advertising, store designs. When we put our members in a room, we have 800 years of aftermarket experience. Members can find solutions to their problems."

IWDA's Piper summed it up best: "For those guys who want to remain as a buying group, those days have passed with vendors."

While the days have passed with the vendors, the field is also more competitive for signing jobbers and WDs. "The times dictate stealing WDs and jobbers," the head of one group said. "With bankruptcies, downsizing and mergers, you have to continue to grow members just because of attrition. We're constantly prospecting."

And the head of one of the older groups is now coveting some of the better small jobbers that now belong to newer groups. "There is NAPA and APS and Carquest and Parts Plus. Those are the real programs with something to offer. All the others are really coops without consistent services. It all depends on the local WD. There're several thousand jobbers maybe only halfway to a real program. we may well be able to win some of them over."

So the jury is still out on the newest programs. There are about a dozen and maybe half will survive the next five years. The major groups are into vertical integration from WD to jobber to installer. For example, NAPA Autocare has 10,000 installer members. Just as the better jobbers went with programs in the 1970s, the better installers are going to lock in with NAPA, APS, Carquest, Parts Plus, or other such programs in the 1990s. The newer groups will have to play catch up in the 1990s. To survive, the feeling is, the newer groups will have to offer full services to jobbers to keep them competitive for wholesale customers. Can they do it? Time will tell. ■



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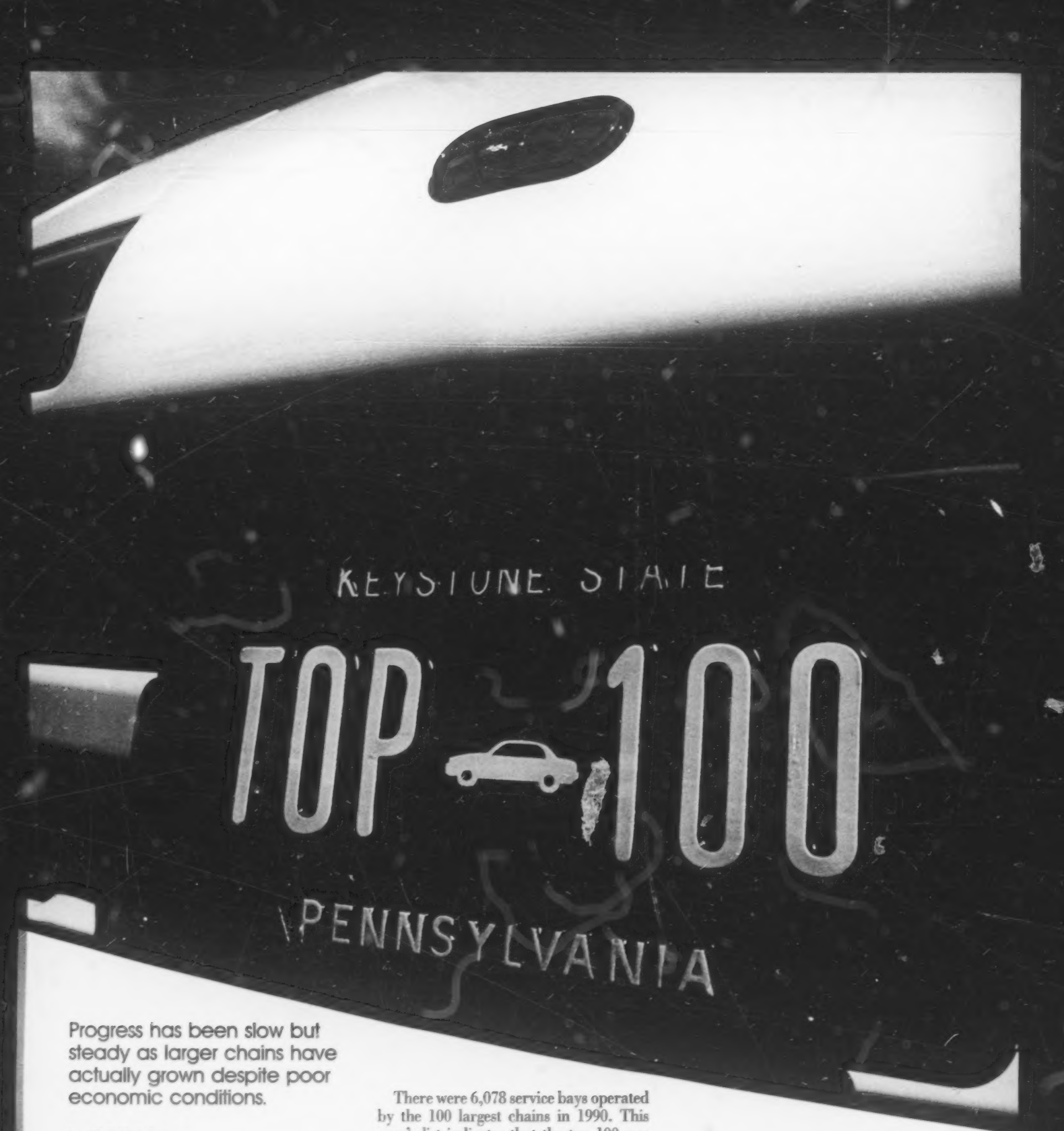

Progress has been slow but steady as larger chains have actually grown despite poor economic conditions.

by **Phil Katcher,**
Business Editor

There have been no revolutionary changes in our annual list of the 100 largest aftermarket chains—retail and jobber—since we published our last one in July 1990.

But, despite poor economic conditions, there are real signs of aftermarket growth across the boards when this year's list and last year's list are compared. There are 8,274 stores on this year's list, compared to 7,767 stores in 1990, a growth rate of almost 7%.

There were 6,078 service bays operated by the 100 largest chains in 1990. This year's list indicates that the top 100 run 7,556 service bays. That's almost 25% more bays opened during one year. What makes this especially interesting is that in 1990 we had to report a 3% *drop* in service bays as compared to the 1989 list.

Finally, sales, both reported and estimated, have risen from $8,432,791,000 to $9,269,355,000. That's a 10% growth during both a recession and an admittedly short-lived war.

As well, the list shows a continued trend towards a "merging market," where volume retailers and traditional jobbers are becoming more and more similar both in operations and appearance. For example, Motor Bearings & Parts, a traditional jobbing chain in North Carolina, reported that virtually none of its sales were retail last year, only 1%. This year, that number has grown to over a quarter of its sales, at 27%.

Major Personnel Changes

Some of the more interesting changes seen when comparing the 1990 Top 100 list to this year's are those involving chief executive officers.

- Edward Szydlik replaced Julius Trump

as CEO at the largest chain, Northern Automotive.

- Szydlik himself was replaced as CEO at Trak Auto by Herbert Haft.
- Michael Tembreull is now the CEO at PACCAR, replacing John Willingham, who himself was new to the 1990 list. PACCAR owns Grand Auto and Al's Auto Supply on the Pacific Coast.
- Alfred Woods, who had been president of R&S/Strauss, a Whitlock division, was named CEO of Whitlock itself. Dean Haulton held that position in 1990.
- Dene Billbe is the new CEO at an enlarged Champion Auto Stores which recently acquired the Crown chain from Northern Automotive.
- R. Jack Alexander III is the CEO at Alexander Seewald's Parts City. Andy Moye held that post on last year's list.
- John Kennedy is the CEO at ITM Automotive Parts; Ed Lynch had been listed in that position last year.
- Ken Himel has taken over the CEO position at the family-owned Himel Auto Parts/Motor Supply conglomerate.
- Milo Allen is CEO at Arnold Motor Supply, the 85th ranked chain. Garlan Odor had been listed in that position last year.

Adding Programmed Distributors

There were, as well, a number of organizational changes between when we published our Top 100 list last year and this year. One obvious one to anyone simply scanning the list of company names, and noting all those small footnote numbers, is the growth of the number of chains which are members of one programmed distribution or buying group or another. Almost half (46%) of the hundred largest aftermarket chains belong to some such group. Last year, we reported only 27% of the chains on the list as belonging to such a group.

The groups to which the top hundred chains belong include AAAD/Parts Plus, AAMUSA, All Pro, APA Management Group, Auto Sure, Auto Value, Big A, Bumper to Bumper, Carquest, Eagle Nation, Federated Auto Parts, IWDA/Road Pro, NAPA, Parts Plus, Pronto, and RPM.

Other changes involved the companies themselves. For example, Straus-Frank, which was the 21st largest chain on last year's list, was renamed Strafco.

The largest chain on the list, Northern Automotive, which operates a number of chains such as Checker, Kragen, and Shuck's, sold off its Crown Auto to Champion, in Minnesota. Therefore, its total number of stores dropped dramatically, although only by 3% since the chain is so large. However, the Crown stores had service bays, which the other Northern chains lacked, and hence the move made sense to top management at Northern.

Some changes related to the economy and frankly weren't positive. A.I. Automotive, the Kuwaiti-owned conglomerate which had 60 stores on last year's list, doesn't appear on this year's list. It wasn't the Middle-East war, but the economy, that has caused that organization problems and caused it to close and sell off many of its stores.

Chains in places hard hit by the recession, such as the auto-making state of Michigan, have had hard times. Michigan's Fox Group, which operates stores under the names of Short's Auto Parts, All-Parts Automotive, and Tony's Parts & Accessories, has been shuttering a number of stores over the past several years and now has 14 stores in its chain. Another Michigan chain, Action Auto, which had been a rapidly rising star in the aftermarket, continued closing stores, slipping from spot number 32 last year to 35 on this year's list.

But, they're not as bad off as the 15 chains on the list of some 400 chains we contact annually to produce this report. They could not be reached by mail or telephone, apparently casualties of the recession of 1990/91. ■

THE 1991 *AM* LARGEST 100 AFTERMARKET CHAINS

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)	CEO	Address and Phone	% of DIY
1.	Northern Automotive [1]	801	0	707,000*	Edward Szydlik	645 Missouri Ave., Suite 400, Phoenix, AZ 85012 (602) 265-9200	95%
2.	Genuine Parts [28]	616	0	616,000	Tom Gallagher	2999 Circle 75 Pkwy., Atlanta, GA 30339 (404) 953-1700	30%
3.	AutoZone	570	0	670,000	Peter Formanek	3030 Poplar Ave., Memphis, TN 38111 (901) 325-4600	95%
4.	Chief Auto Parts Inc.	522	5	461,000*	Mike Manor	15303 Dallas Pkwy, Ste 800, Dallas, TX 75248 (214) 404-1114	95%
5.	Western Auto	517 [2]	3,185	1,310,000*	John T. Lundegard	2107 Grand Ave., Kansas City, MO 64108 (816) 346-4000	95%
6.	Trak Auto	335	0	293,075	Herbert H. Haft	3300 75th Ave., Landover, MD 20785 (301) 731-1200	95%
7.	The Pep Boys	313	2,400	884,674	Mitchell G. Leibovitz	3111 W. Allegheny Ave., Philadelphia, PA 19132 (215) 229-9000	99%
8.	Nationwise Automotive, Inc.	300	400	290,000*	Saul Levy	3750 Courtright Ct., Columbus, OH 43227 (614) 239-1111	95%
9.	Advance Stores Co.	211	0	200,000*	Nicholas Taubman	1342 West Eighth, Roanoke, VA 24015 (703) 345-4911	99%
10.	Fisher Auto Parts [25]	181	0	110,000	Art Fisher	512 Greenville Ave., Staunton, VA 24401 (703) 885-8901	20%
11.	Parts Inc. [4]	180	0	159,000*	Mike Ormiston	601 S. Dudley, Memphis, TN 38104 (901) 523-7711	35%
12.	Super Shops	162	385	200,000	Harry Eberlin	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660 (714) 644-9900	95%
13.	Discount Auto Parts, Inc.	150	0	132,000*	Denis L. Fontaine	4900 Frontage Rd. South, Lakeland, FL 33802 (813) 687-9226	99%
14.	PACCAR [5]	130	600	226,000	Mike Tembreull	1400 North 4th St., Renton, WA 98055 (206) 251-7600	93%
15.	Sieg Auto Parts	121	0	142,000*	Madis Sulg	500 Iowa St., POB 4230, Davenport, IA 52808 (319) 323-3641	5%
16.	Whitlock [3]	121	0	107,000*	Alfred Woods	1375 Mt. Prospect Rd., Des Paines, IL 60018 (708) 699-5040	95%
17.	APS (Big A Auto Parts) [19]	117	0	134,000*	Richard J. Speller	3000 Pawnee St., Houston, TX 77054 (713) 741-2470	33%
18.	O'Reilly Automotive (Ozark) [18]	115	0	93,000	Charles O'Reilly	233 S. Patterson, Springfield, MO 65802 (417) 862-3333	50%
19.	HILO Auto Supply Companies	108	0	142,500	T. Michael Young	8601 Tavenor Lane, Houston, TX 77075 (713) 991-6052	78%
20.	General Parts [21]	102*	0	75,000*	Temple Sloan	2635 Millbrook Rd., Raleigh, NC 27604 (919) 876-9813	20%
21.	Rose Auto Stores (Whitlock)	100	0	88,000*	Don Goodman	4760 NW 165th St., Hialeah, FL 33014 (305) 625-7786	95%
22.	Strafco Inc. [21]	94	35	75,000	David Straus	POB 600, San Antonio, TX 78292 (512) 226-0101	30%
23.	Republic Auto	80	0	40,000	Keith Thompson	POB 2088, Brentwood, TN 37024 (615) 373-2050	40%
24.	ADAP (Rite Aid)	79	0	72,726	Wayne Yodzio	660 Bodwell St., Ext. Avon, MA 02322 (617) 587-8400	99%
25.	R&S/Strauss (Whitlock)	76	168	107,000*	Alfred Woods	1835 Burnet Ave., Union, NJ 07083 (201) 686-8200	95%

* Automotive Marketing estimate for 1991.
[1] Includes Checker/Schuck's/Kragen, Auto Works, U-Save, and Crown Auto
[3] Includes Giant Auto, Motormart, National Auto, and Strum Auto
[4] Includes National Automotive Superstores, Save Auto Stores
[5] Includes Al's Auto Supply and Grand Auto
[18] A member of the Autovalue (Springfield, MO) programmed distribution group
[19] A member of the Big A (Houston, TX) programmed distribution group
[21] A member of the Carquest (Tarrytown, NY) programmed distribution group
[25] A member of the Federated Auto Parts (Staunton, VA) programmed distribution group
[28] A member of the NAPA (Atlanta) programmed distribution group

TOP RETAIL CHAINS

One proof of the relative quiet among volume retailers specializing in the aftermarket DIY trade is the little change among the top retailers this year as opposed to last. The 1991 top retail chain list is virtually the same as that published in 1990. The only changes are Nationwise and Pep Boys switching places, for the third time in as many years, and Discount Auto Parts moving up and overtaking PACCAR to take the last place in the list.

It's now been five years that we have been tracking the top retailing chains in the country. And, one can spot a great number of changes in that list over those past five years. The original list of June 1987 included:

1. Checker/Shuck's/Kragen: 480 stores
2. Chief Auto Parts: 465 stores
3. Auto Shack: 355 stores
4. Otasco: 267 stores
5. Western Auto: 251 stores
6. Auto Works: 236 stores
7. Trak Auto: 212 stores
8. The Pep Boys: 180 stores
9. Nationwise: 178 stores
10. Steego Auto Parts: 147 stores

In all, the top ten operated 2,593 stores five years ago. Only half a decade later, the ten largest volume retail chains operate 3,901 stores, an increase of some 50%.

Among other changes from 1987, Checker/Shuck's/Kragen is now a part of Northern Automotive. Auto Shack, under pressure from Radio Shack, became AutoZone. Otasco and Auto Works, owned by Perry Drugs, have folded, and Steego is now Parts Depot/Steego.

Later, the Ward White Group made the top ten list, in 1989 being listed as the seventh largest aftermarket volume retail chain. When Ward White sold its stores and they began to be operated as three autonomous chains, *Whitlock, Rose, and R&S/Strauss, we began listing them separately.*

It is also interesting that while most volume retailers don't operate service bays, half of the ten largest chains indeed offer professional repair and installation. This is down from six last year, following the sale of Crown stores to Champion by Northern Automotive. The rest obviously are aware of the large "do-it-for-me" market that exists in America today. ■

THE *AM* TOP TEN RETAIL CHAINS

(Chains doing 90% or more retail/DIYer sales, based on their reported number of stores; showing their place on Top 100 list.)

List #	Chain	100 List #	% DIY	Address
1.	Northern Automotive	1	95%	645 Missouri Ave., Suite 400, Phoenix, AZ 85012
2.	AutoZone	3	95%	3030 Poplar Ave., Memphis, TN 38111
3.	Chief Auto Parts Inc.	4	95%	15303 Dallas Pkwy, Suite 800, Dallas, TX 75248
4.	Western Auto	5	95%	2107 Grand Ave., Kansas City, MO 64108
5.	Trak Auto	6	95%	3300 75th Ave., Landover, MD 20785
6.	The Pep Boys	7	99%	3111 W. Allegheny Ave., Philadelphia, PA 19132
7.	Nationwise	8	95%	3750 Courtright Ct., Columbus, OH 43227
8.	Advance Stores Co.	9	99%	1342 W. Eighth, Roanoke, VA 24015
9.	Super Shops	12	95%	620 Newport Center Dr., Suite 860, Newport Beach, CA 92660
10.	Discount Auto Parts	13	99%	4900 Frontage Rd. South, Lakeland, FL 33802

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)*	CEO	Address and Phone	% DIY
26.	Advantage Auto Stores (Hahn) [19]	72	0	83,000*	Mike Futerman	415 W. Main St., Rochester, NY 14608 (716) 235-1595	40%
27.	Crow-Burlingame	72	0	34,000	Fletcher Lord, Jr.	520 W. Capital, Box 111, Little Rock, AR 72203 (501) 372-5275	25%
28.	Parts Depot/Steego Auto Parts	72	0	64,000*	Rollance Olson	2177 Dale Ave., Roanoke, VA 24013 (703) 345-1001	40%
29.	Hi-Gear Tire & Auto Supply	63	0	56,000*	Stan Love	110 Ritchie Rd., Capitol Heights, MD 20743 (301) 336-3000	95%
30.	Quality Stores	61	100	54,000*	John L. Hill	1460 Whitehall Rd., North Muskegon, MI 49445 (616) 744-2491	95%
31.	Forest City Auto Parts Co., Inc.	51	0	65,000	Arnold Bellowe	25201 Chagrin Blvd., Ste 350, Beachwood, OH 44122 (216) 292-2525	90%
32.	Brooks Auto Parts/Supply [28]	51	0	59,000*	Elton D. Brooks, Jr.	402 S. Peterson Ave., Douglas, GA 31533 (912) 384-7818	45%
33.	Kentucky Motor Service (KOI) [25]	50	0	57,000*	Anthony W. Nellner	POB 395, Covington, KY 41011 (606) 431-6025	30%
34.	Big Bear Stores	46	0	41,000*	Jerry Hammerel	640 54th Ave. N., St. Cloud, MN 56301 (612) 251-9000	95%
35.	Action Auto [7]	45	18	40,000*	Dick Sabo	2128 S. Dort Hwy, Flint, MI 48507 (313) 235-5600	95%
36.	Valley Motor Supply [20]	45	0	40,000*	Allen Dedman	2635 S. Bellnap Ave., Billings, MT 59107 (406) 259-4577	50%
37.	Champion Auto Stores	42 [7]	160	100,000	Dene E. Billbe	5520 N. U.S. Highway 169, New Hope, MN 55428 (612) 535-5984	95%
38.	Big Wheel Auto/Rossi Stores [32]	40	0	27,000	R.B. Shaller	2300 P. Lot Knob Rd., Mendota Heights MN 55120 (612) 452-7484	95%
39.	Ace Auto Parts [17]	40	0	46,000*	Thomas D. Cox	4750 118th Ave., N., Clearwater, FL 34622 (813) 573-2800	45%
40.	Murray's Discount Auto Stores	40	0	35,000*	Albert Pitt	21500 Trolley Ind. Dr., Taylor, MI 48180 (313) 292-2800	90%
41.	Pettigrew-Smith/Dale's [26]	37	0	33,000*	Bob Merrill	8119 Jensen Dr., Houston, TX 77093 (713) 695-3613	95%
42.	Taylor Parts, Inc. (TPS) [13]	36	0	55,000	James M. Taylor II	208 E. 3 Notch St., Andalusia, AL 36420 (205) 222-6534	40%
43.	Anderson Auto Parts [29]	35	0	21,000	H.G. Anderson III	POB 767, Anderson, SC 29622 (803) 224-6321	50%
44.	Main Auto Parts	35	0	30,000*	Bart Weprin	1422 N. Main, Dayton, OH 45405 (513) 277-7393	20%
45.	The Carport (Harco Drug)	34	0	19,890	David Fuhrman	3925 Rice Mine Rd., Tuscaloosa, AL 35406 (205) 345-2400	85%
46.	Davis & Wilmar [28]	33	4	19,500	Gary Davis	609 Epsilon Dr., Pittsburgh, PA 15238 (412) 963-7776	35%
47.	Worldwide Auto Parts, Inc.	33	7	19,000	Jim Foos (COO)	87 Brooklyn Ave., Youngstown, OH 44507 (216) 782-2204	95%
48.	Northern Auto Supply Co. [30]	32	0	19,000	Don Kornis	1906 N. Peach St., Marshfield, WI 54449 (715) 384-2124	25%
49.	Keenan Auto Parts [20]	32	0	37,000*	Frank Ahouse	112 N. Front St., Albany, GA 31703 (912) 432-6241	5%
50.	Benny's	29	12	25,000	Malcolm C. Bromberg	340 Waterman Ave., Esmond, RI 02917 (401) 231-1000	95%

* Automotive Marketing estimate for 1991.
[7] Includes company-owned stores only; with franchisee total is much greater
[13] A member of the All Pro (Andalusia, AL) programmed distribution group
[19] A member of the Autovalue (Springfield, MO) programmed distribution group
[20] A member of the Bumper to Bumper (New York) programmed distribution group
[25] A member of the Federated Auto Parts (Staunton, VA) programmed distribution group
[26] A member of the IMDA/Road Pro (Houston) programmed distribution group
[28] A member of the NAPA (Atlanta) programmed distribution group
[29] A member of the Pronto (Springfield, IL) programmed distribution group
[32] A member of the RPM (Roanoke, VA) buying group

TOP REPORTED SALES

Every year we limit our list of chains with the top sales to those which actually report their gross sales either because they're public or they chose to provide us with that information. Of course, many major chains, which would probably be on this list, are closely held and decline to release that information. Who does and doesn't varies widely.

For example, Western Auto chose to report its sales to us last year and was the top revenue producer in last year's list. This year, they chose to keep that figure confidential.

Largely due to the loss of Western's figures and the poor economy, the overall figure of $3,184,749,000 in gross sales produced by the ten on the 1991 list is smaller than the $4,654,791,000 in gross sales listed in 1991.

However, the chains on this year's list and last year's did post gains individually. The Pep Boys went up from $798,691,000 in 1990 to $884,674,000 this year. Genuine Parts went from $500,000,000 last year to $616,000,000. Trak Auto went from $275,700,000 to $293,075,000. Super Shops went from $180,000,000 to $200,000,000. Super Shops also appears on the list of the ten fastest growing chains among the top 100 chains. And, HI/LO went from $113,700,000 to $142,500,000.

On the whole, too, among chains that did report their actual sales, they say that sales, when divided by the number of stores they operate, have risen. In 1990's list, each store generated roughly a half a million dollars in sales. This year, each store brought in some $880,000 in sales. Chains with higher retail sales reported lower overall stores than traditional market jobber chains.

At the same time, Action Auto, which ran into serious financial problems in 1990/91, dropped off the top ten revenue producing list in 1991.■

THE *AM* TOP TEN CHAINS REPORTING ACTUAL SALES

(Based on sales figures provided by each chain, in thousands of dollars.)

List #	Chain	100 List #	Sales	Address
1.	The Pep Boys	7	884,674	3111 W. Allegheny Ave., Philadelphia, PA 19132
2.	AutoZone	3	670,000	POB 2088, Brentwood, TN 37024
3.	Genuine Parts	2	616,000	2999 Circle 75 Pkwy., Atlanta, GA 30339
4.	Trak Auto	6	293,075	3300 75th Ave., Landover, MD 20785
5.	Super Shops	12	200,000	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660
6.	HI/LO	19	142,500	8601 Tavenor, Houston, TX 77057
7.	Fisher	10	110,500	512 Greenville Ave., Staunton, VA 24401
8.	Champion	37	100,000	5520 N. U.S. Highway 169, New Hope, MN 55428
9.	O'Reilly Automotive	18	93,000	233 S. Patterson, Springfield, MO 65802
10.	Strafco	22	75,000	POB 600, San Antonio, TX 78292
	TOTAL SALES		$3,184,749	

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)*	CEO	Address and Phone	% DIY
51.	Twin "B" Auto Parts [32]	28	0	15,000	William O'Connor	528 S. Military Hwy., Virginia Beach, VA 23464 (804) 420-3342	99%
52.	Ben Pilla Speed Shops	28	2	11,890	Ben Pilla	118 N. Black Horse Pike, Bellmawr, NJ 08031 (609) 931-4041	95%
53.	Linkon's Auto Supply	28	0	25,000*	Leonard Linkon	2720 E. 2nd St., Centralia, IL 62801 (618) 533-1311	50%
54.	Wheels Discount Auto Stores (Fay Drugs)	28	0	25,000*	Gale Mitchell	4577 Buckley Rd., Liverpool, NY 13088 (315) 652-7000	95%
55.	Barnes Motor & Parts Co. Inc. [14]	27	0	24,000	Robert E. Kirkland, Jr	315 E. Barnes St., Wilson, NC 27893 (919) 243-2161	25%
56.	Automotive One Parts Stores [28]	27	0	17,000	Robert H. Gentry III	701 W. Church St., Orlando, FL 32802 (407) 422-1110	45%
57.	J. Burdman Auto Parts	27	0	5,000	Bernard Burdman	801 N. Franklin St., Kirksville, MO 63501 (816) 665-3787	15%
58.	Parts City, Inc. (Alex. Seewald) [17]	26	0	13,000	R. Jack Alexander, III	515 Wharton Circle, S.W., Atlanta, GA 30318 (404) 352-0146	99%
59.	Cardis [7 21]	25	0	61,600	Ken Walker	12950 E. Alondra Blvd., Cerritos, CA 90701 (213) 926-4492	45%
60.	ITM Automotive Parts	25	0	26,000	John Kenney	13140 Alondra Blvd., Cerritos, CA 90701 (213) 926-6582	35%
61.	One Stop Auto Parts	24	0	14,000	Gerald Klein	1113 62nd Ave. N., St. Petersburg, FL 33702 (813) 522-2897	90%
62.	Motor Bearings & Parts Co. [11] (CJS Inc.)	24	0	12,000	Bill White	427 S. Dawson St., Raleigh, NC 27602 (919) 832-3961	27%
63.	Bennett Auto Supply, Inc. [18]	23	0	24,000	Allen Bennett	3869 N. Dixie Hwy., Oakland Park, FL 33334 (305) 565-4636	50%
64.	SAS Auto Parts Co.	23	0	20,000	George Segal	129 Manchester St., Concord, NH 03301 (603) 225-4000	25%
65.	Allied Auto Parts Co. [20]	23	0	14,000	Daniel Sennet	43 N. Montello St., Brockton, MA 02401 (508) 588-8500	30%
66.	Himel Auto Parts/ Motor Supply [28]	23	0	26,000*	Ken Himel	1215 E. Main, New Iberia, LA 70560 (318) 364-7201	30%
67.	BWP [7 21]	23	0	26,000*	Neil Stokel	1055 Bronx River Ave., Bronx, NY 10472 (212) 991-9000	1%
68.	Kirkham Auto Parts [18]	23	0	20,000*	Michael Kirkham	POB 718, Blackfoot, ID 83221 (208) 785-2902	50%
69.	688 Parts Service, Inc. [30]	22	0	12,000	George E. Tricou Jr.	9126 Green Springs Rd., Baton Rouge, LA 70814 (504) 924-6888	25%
70.	Acme Auto Supply, Inc. [18]	21	0	20,000	James Fine	620 R. Oakwood Ave., West Hartford, CT 06110 (203) 246-2540	30%
71.	Beacon Auto Parts Co.	21	0	20,000	Fred J. Pisciotta	911 Lowry Ave., Jeannette, PA 15644 (412) 527-5612	30%
72.	Foreign Autoparts	21	0	18,500	Steve Pallin	1205 Route One, Sharon, MA 02067 (617) 784-1111	70%
73.	Giant Auto Parts	21	0	18,500*	Robert Levy	2236 S. Hamilton Ave., White Hall, OH 43232 (614) 864-3811	30%
74.	VIP Discount Auto [32]	20	69	20,500	Thomas O. Auger	12 Lexington St., Lewiston, ME 04240 (207) 784-5423	99%
75.	Royal Auto Supply	20	0	15,000	Jon Stenn	Twin Park Industrial Center, Colmar, PA 18915 (215) 822-1359	95%

* Automotive Marketing estimate for 1991.
[7] Includes company-owned stores only; with franchisee total is much greater
[11] A member of the AAAD/Parts Plus (Memphis, TN) programmed distribution group
[14] A member of the APA Management Group (Mission, KS) programmed distribution group
[17] A member of the Auto Sure (Atlanta, GA) programmed distribution group
[18] A member of the Autovalue (Springfield, MO) programmed distribution group
[21] A member of the Carquest (Tarrytown, NY) programmed distribution group
[28] A member of the NAPA (Atlanta) programmed distribution group
[30] A member of the Pronto (Springfield, IL) programmed distribution group
[32] A member of the RPM (Roanoke, VA) buying group

CHAINS WITH SERVICE

There has been a tremendous growth in the number of service bays the ten largest chains which offer professional installation and repair operate in 1991 as opposed to 1990. Last year, the ten largest chains operated 5,983 bays; this year they operate 7,502 bays. This is a growth of 1,519 bays, a 25% increase in just one year.

Leading the growing chains has been Western Auto, which jumped from 1,489 bays in 1990 to 3,185 bays this year. These bays are located not only in Western stores, but also its tire store subsidiaries.

Other chains have continued to add bays. Nationwise added over 50 bays to its stores throughout 1990 and early 1991. Super Shops added another 35 bays.

As well, Champion Auto was the tenth largest chain with service in 1990, operating 80 bays. Since then, however, the company has purchased the stores operated as Crown Auto from Northern Automotive, which as gotten out of the service business. Champion now runs twice as many bays as it did a year ago.

Indeed, the big story among chains with professional service over the past 12 months has been the sale of Crown. In last year's top ten service providers list, Northern Automotive was listed with 150 service bays—all Crown operations. Although it appears to run counter to the trend of serving "do-it-for-me'ers", Northern has decided to concentrate strictly on the DIY, volume retail market.

Besides Northern, Action Auto has been dropped from the list. Although it still operates service bays, the chain, which has restructured to solve its financial woes, now only operates 18 bays, compared to the 300 it ran in its salad days last year. ■

THE *AM* TOP TEN SERVICE PROVIDERS

(Based on number of service bays operated by each chain.)

List #	Chain	100 List #	Svc Bays	Address
1.	Western Auto	5	3,185	2107 Grand Ave., Kansas City, MO 64108
2.	The Pep Boys	7	2,400	3111 W. Allegheny Ave., Philadelphia, PA 19132
3.	PACCAR	14	600	1400 N. 4th St., Renton, WA 98055
4.	Nationwise	8	400	3750 Courtright Ct., Columbus, OH 43227
5.	Super Shops	12	385	620 Newport Center Dr. Ste 860, Newport Beach, CA 92660
6.	R&S/Strauss	25	168	1835 Burnet Ave., Union, NJ 07083
7.	Champion Auto	37	160	5520 N. U.S. Highway 169, New Hope, MN 55428
8.	Quality Stores	30	100	1460 Whitehall Rd., North Muskegon, MI 49445
9.	VIP Discount	74	69	12 Lexington St., Lewiston, ME 04240
10.	Strafco	22	35	POB 600, San Antonio, TX 78292
	TOTAL BAYS		7,502	

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)*	CEO	Address and Phone	% DIY
76.	Sturdevant's Inc. [30]	20	1	14,000	Jack Sturdevant	POB 948, Sioux Falls, SD 57101 (605) 336-0678	30%
77.	Galling's Auto Stores [24]	20	5	9,000	Albert C. Premus	117 W. Peach St., Connellsville, PA 15425 (412) 628-3340	90%
78.	Automyte [30]	20	0	4,000	David Stucky	POB 578, Hemingway, SC 29554 (803) 558-3914	50%
79.	Erlich/Airland Auto Parts [11]	20	0	18,000*	Herbert August	POB 277, Albany, NY 12202 (518) 449-1176	40%
80.	Performance Centers of America	20	0	18,000*	Donald R. Raleigh	180 Whitman Ave., Edison, NJ 08817 (201) 287-5200	95%
81.	All State 1 [26]	20	0	17,000*	Warren Morgan	3131 N. I-10 Service Rd., Metairie, LA 70002 (504) 834-5500	80%
82.	The Flowers Co. [13]	19	0	12,000	John R. Flowers	POB 1118, Hickory, NC 28603 (704) 322-5414	40%
83.	Rodefeld's [30]	19	0	12,000	Charles A. Rodefeld	96 W. Main, Richmond, IN 47374 (317) 935-7626	50%
84.	Loe's Parts Plus Autostores [11]	19	0	10,000	John Loe	401 NE Front St., DeKalb, TX 75559 (903) 667-2541	40%
85.	Arnold Motor Supply [18]	19	0	22,000*	Milo Allen	110 W. 4th, POB 5008, Spencer, IA 51301 (712) 262-4287	20%
86.	Interstate Auto [25] (Fisher)	19	0	22,000*	J. Lon Schuster	311 E. Dixie, Elizabethtown, KY 42701 (502) 765-6183	30%
87.	Mollin Auto [11]	18	0	20,500*	Carl E. Mollin	3896 Union Rd., Buffalo, NY 14225 (716) 633-4455	15%
88.	Auto Parts World	18	0	16,000*	Andrew Dabrowski	1176 W 14 Mile Rd., Clawson, MI 48017 (313) 288-0845	90%
89.	Byrd's Auto [25]	18	0	16,000*	Stan Byrd	262 N. Main St., Burlington, NC 27215 (919) 226-0244	10%
90.	Von Housen Auto Parts	17	0	12,000	Robert Neeley	10057 Mills Station Rd., Sacramento, CA 95827 (916) 362-0691	50%
91.	H.E. Everson Auto	17	0	8,000	Kirk Sand	2904 Gateway Dr., Grand Forks, ND 58201 (701) 772-4839	25%
92.	Acme Auto (Amalgamated)	17	0	19,000*	Kurt J. Myers	1731 S. 19th St., Harrisburg, PA 17104 (717) 939-7893	20%
93.	National Auto Supply [25]	17	0	19,000*	Clifford Shanfeld	8514 Eager Rd., St. Louis, MO 63144 (314) 968-8511	5%
94.	O.K. Auto Supply Co. [14]	17	0	19,000*	William Larson	605 Elm St., Iapheming, MI 49849 (906) 485-5181	20%
95.	Parker Auto Supply	17	0	15,000*	W.W. Parker	POB 760, Sumter, SC 29151 (803) 775-6721	10%
96.	Morgan Auto	16	0	9,000	Jay Morgan	817 Morlontown Ave., Fairmont, WV 26554 (304) 366-3860	25%
97.	Brittain Brothers [28]	16	0	11,500*	Robert Saunders	POB 25821, Oklahoma City, OK 73125 (405) 235-1785	30%
98.	Fair Auto Supply	15	0	15,000	John DeMattia	760 Lordship Blvd., Stratford, CT 06497 (203) 375-3643	10%
99.	AEW (DAPS) [12]	15	0	15,000	Marlin Sharron	604 N. Pace Blvd., Pensacola FL 32505 (904) 434-6484	75%
100.	Hedahls Automotive Center	15	4	15,000	Dick Hedahl	POB 1038, Bismarck, ND 58502-1038 (701) 223-8393	20%
Total		8,274	7,556	9,269,355*			

* Automotive Marketing estimate for 1991.
[11] A member of the AAD/Parts Plus (Memphis, TN) programmed distribution group
[12] A member of the AAMUSA programed distribution group
[13] A member of the All Pro (Andalusia, AL) programmed distribution group
[14] A member of the APA Management Group (Mission, KS) programmed distribution group
[18] A member of the Autovalue (Springfield, MO) programmed distribution group
[24] A member of the Eagle Nation (Pearland, TX) programmed distribution group
[25] A member of the Federated Auto Parts (Staunton, VA) programmed distribution group
[26] A member of the IVDA/Road Pro (Houston) programmed distribution group
[28] A member of the NAPA (Atlanta) programmed distribution group
[30] A member of the Pronto (Springfield, IL) programmed distribution group

THE *AM* TEN FASTEST GROWING CHAINS, 1990-1991

(The fastest growing chains, in terms of total stores listed in the July 1990 Top 100 list and this list.)

#	Chain	1990 List #	1991 List #	1990 Stores	1991 Stores	Total Growth	% Growth
1.	Keenan	64	49	22	32	10	45%
2.	Advance	10	9	170	211	41	24%
3.	Fisher	11	10	150	181	31	21%
4.	Discount	14	13	125	150	25	20%
5.	Murray's	44	40	34	40	6	18%
6.	Super Shops	12	12	145	162	17	12%
7.	Rodefeld's	94	83	17	19	2	12%
8.	Republic	26	23	72	80	8	11%
9.	Big Wheel	40	38	36	40	4	11%
10.	Rose	22	21	90	100	10	10%

FASTEST GROWING CHAINS

Despite generally poor economic conditions throughout the industry, some chains have recorded double-digit growth during the past 12 months. This marks the second year in a row that some of these companies have been listed with the ten fastest growing chains.

Advance Auto, in Roanoke, VA, added 20 stores between 1989 and 1990, giving it a 13% growth rate and ending up in the number two spot in the 1990 list. It's still in the number two spot this year, with its 41 new stores. Some of these stores had been Crazy Joe's stores in 1989.

Super Shops was in the tenth spot in 1990 with a 4% growth rate. This year, it expanded with 12% more stores in 1991 than in 1990. ■

JOBBER CHAINS

While it is true that the number of chains that have crossed over from one segment of the aftermarket to another has been steadily increasing, a number of major players have remained strictly traditional. Indeed, the ninth largest aftermarket chain, Fisher, up from the number 11 spot last year, does 80% of its business wholesale and has shown no interest in retail business since it was founded in 1929. Indeed, Motor Bearings & Parts says it does virtually no retail business at all.

Generally, there has been little change between this year's top ten jobber chain list and that published last year. ■

THE *AM* TOP TEN JOBBER CHAINS

(Chains doing 75% or more wholesale sales; showing place on Top 100 list.)

List #	Chain	100 List #	% Whsle	Address and Phone
1.	Fisher Auto Parts	10	80%	512 Greenville Ave., Staunton, VA 24401 (703) 885-8901
2.	Sieg Auto Parts	15	95%	500 Iowa St., POB 4230, Davenport, IA 52808 (319) 323-3641
3.	General Parts	20	80%	2635 Millbrook Rd., Raleigh, NC 27604 (919) 876-9813
4.	Crow-Burlingame	27	75%	520 W. Capitol, Box 111, Little Rock, AR 72203 (501) 372-5275
5.	Main Auto Parts	44	80%	1422 N. Main, Dayton, OH 45405 (513) 277-7393
6.	Northern Auto Supply Co.	48	75%	1906 N. Peach St., Marshfield, WI 54449 (715) 384-2124
6.	Keenan Auto Parts	49	95%	POB 767, Anderson, SC 29622 (803) 224-6321
7.	Barnes Motor & Parts	55	75%	315 E. Barnes St., Wilson, NC 27893 (919) 243-2161
8.	J. Burdman Auto Parts	57	85%	801 N. Franklin St., Kirksville, MO 63501 (816) 665-3787
9.	Motor Bearings & Parts	62	99%	427 S. Dawson St., Raleigh, NC 27602 (919) 832-3961
10.	SAS Auto Parts Co.	64	75%	129 Manchester St., Concord, NH 03301 (603) 225-4000

THE *AM* TOP TEN CHAINS IN PROGRAMMED DISTRIBUTION GROUPS

(Showing percentage of retail sales)

List #	Name of Chain	Stores	100 List #	% Retail	Programmed Distribution Group
1.	Genuine Parts	616	2	30%	NAPA, Atlanta
2.	Fisher	181	10	20%	Federated, Staunton, VA
3.	APS	117	17	33%	Big A, Houston
4.	O'Reilly	115	18	50%	Auto Value, Springfield, MO
5.	General Parts	102*	20	20%	Carquest, Tarrytown, NY
6.	Strafco	92	22	30%	Carquest, Tarrytown, NY
7.	Advantage	72	26	40%	Auto Value, Springfield, MO
8.	Brooks Auto Parts/Supply	51	32	45%	NAPA, Atlanta
9.	Kentucky Motor Service	50	33	30%	Federated, Staunton, VA
10.	Ace Auto Parts	40	39	45%	Auto Value, Springfield, MO

PROGRAM MEMBERS

Alert readers will note that the number of chains saying they belong to one programmed distribution organization or another has grown greatly in 1991 over 1990. As well, among our top ten chains which are also programmed distribution group members, last year only five groups (Big A, Bumper to Bumper, Carquest, IWDA, and NAPA) were mentioned last year. This year, seven groups were mentioned.

The list is somewhat misleading in that NAPA is actually partly owned by Genuine Parts. Also, APS owns Big A and Fisher owns Federated as well as operating stores under different names. Auto Sure is owned by Alexander-Seewald which also owns the retail chain Parts City. ■

SPEED SHOPS

The trend over the past year in speed and performance shops has been the same as that in the overall aftermarket—the big have grown bigger while the small have just survived.

Yet, the market has grown. In 1990 we reported 223 stores owned by the ten largest speed shops; the number is 236 stores this year. However, the growth has been strictly by California's Super Shops. And, last year the smallest chain we reported on had three stores, while this year two two-store chains end the list.

Last year Seco Performance Centers, with four stores, was number seven on the list. This year, the company simply listed itself as Seco, with a more general aftermarket emphasis than before. Seco has been replaced on this list by Van Iderstine Speed & Auto Centers. This makes California and, unexpectedly enough, New Jersey leading the list of states with speed shop chains headquartered in them. ■

THE *AM* TOP TEN SPEED SHOP CHAINS

List #	Chain	# of Stores	CEO	Address
1.	Super Shops	162	Harry Eberlin	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660
2.	Ben Pilla Speed Shops	28	Ben Pilla	118 N. Black Horse Pike, Bellmawr, NJ 08031
3.	Performance Centers of America	20	D.R. Raleigh	180 Whitman Ave., Edison, NJ 08817
4.	Rons Performance	7	R.T. Uemura	2760 Kilihau St., Honolulu, HI 96819
5.	Speed Unlimited Inc.	5	Peter Mandes	4771 Allentown Rd., Morningside, MD 20746
6.	United Speed World	4	Terry Lewis	734 W. Brandon Blvd., Brandon, FL 33614
7.	High Tech Performance	3	S.J. Ventimiglia	7885 University Ave., La Mesa, CA 92041
8.	Jeg's High Performance Centers	3	Ed Coughlin	751 E. 11th Ave., Columbus, OH 43211
9.	PV Performance Centers	2	Brian Peavey	124 Eastern Ave., Malden, MA 02148
10.	Van Iderstine Speed & Auto Center	2	Pete Van Iderstine	245 Rte. 10, E. Hanover, NJ 07936
	Total	236		